

# Manual Assessment User Guide

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# Overview

The Manual Assessment functionality enables users to input or manually key enter scores for assessments conducted outside the USA Staffing and USA Hire systems. Such assessments can include Subject Matter Expert (SME) panel ratings, structured interviews, accomplishment records, agency tests, or composite scores from multiple assessments. This guide outlines how to set up, score, export, and import Manual Assessments, as well as use them with Panel Reviews. Scenarios are provided to illustrate practical use; however, the Manual Assessment functionality is flexible, and agencies can use it in different ways depending on the job analysis, consultation with the selecting official, and agency guidance.

This guide aims to assist in using Manual Assessments effectively. Testing the desired approach in the [USA Staffing Training](#) environment is recommended before applying it to a live vacancy.

## Creating a Manual Assessment

Manual Assessments can be added to either a vacancy's Assessment Package or to an Assessment Package Template. If you plan to include a Manual Assessment in your vacancy's Assessment Package, you must do so *before the announcement is released and opened to USAJOBS*. You should also inform applicants in the Announcement Text ("How You Will Be Evaluated" section) of any additional assessment steps that will occur after they submit their application.

Manual Assessments may be combined with a Minimum Qualifications occupational Questionnaire, USA Hire assessment, and/or SME Evaluation assessment, and they can be part of a multiple hurdles assessment approach. In addition, multiple Manual Assessments can be used to capture scores for multiple assessments delivered outside the system. For more information on using a multiple hurdle process, please see the [Multiple Hurdles Guide](#) on the [USA Staffing Resource Center](#).

To create a Manual Assessment:

1. Click the *Assessment Package* tab.
2. On the Assessment Plan page, click *New Assessment*. The *Create Assessment* tab will be displayed.

3. Enter the *Assessment Name* and select *Manual* from the *Assessment Type* drop-down.

The screenshot shows the 'Assessment Information' section with the following details:

- Assessment Name:** HR specialist SI
- Assessment Type:** Manual
- Assessment Method:** Interview
- Assessment Method Details:** Structured Interview, Technical Interview
- Screen-out:**
- Rating:**
- Passing Score:**
- Owner:** Kasey Acres
- Hurdle:** Hurdle 2: Manual Assessment

The 'Assessment Rating Settings' section includes a table for 'Standardize scores':

Series	Grade	Min Raw Score	Max Raw Score	Min Z-Score	Max Z-Score
0201 - Human Resources Management	12	0	25	-3	3
0201 - Human Resources Management	13	0	30	-3	3

4. Select the *Assessment Method* and the *Assessment Method Details*. These are labels to identify the type of test represented by the Manual Assessment but have no effect on how the assessment is scored. Options depend on the selected *Assessment Method*, and multiple choices are possible.

- **Online/Paper-Pencil Assessment:** Multiple-choice questions administered online or on paper, outside USA Staffing and USA Hire.
  - **Biodata:** Measures past events and behaviors reflecting personality attributes, attitudes, experiences, interests, skills, and abilities to predict overall job performance.
  - **Job Knowledge:** Assesses technical or professional expertise in specific areas.
  - **Personality/Non-Cognitive:** Evaluates non-cognitive traits like personality, preferences, work styles, and integrity to estimate applicants' potential to use mental processes to solve work-related problems or acquire knowledge.
  - **Cognitive Ability/Reasoning:** Tests thinking abilities such as reasoning, perception, memory, verbal and mathematical skills, and problem-solving to estimate applicants' potential to use mental processes to solve work-related problems or to acquire new job knowledge.
  - **Situational Judgment:** Presents job-related problems or scenarios for applicants to evaluate potential responses.
- **Panel Review:** Evaluation of applicants' documents by one or more Subject Matter Experts (SMEs).
  - **Accomplishment Record:** Evaluates applicants' accomplishments to demonstrate proficiency in key job competencies, typically rated by trained SMEs against set criteria.
  - **Crediting Plan:** Systematically assesses applicants' backgrounds (e.g., positions held, levels of responsibility, accomplishments, job-related education) against job-related criteria.
  - **Reference Check:** Objectively evaluates past job performance based on feedback from supervisors, peers, and subordinates.

- *Structured Resume Review*: A panel of SMEs systematically reviews resumes to determine if applicants have the necessary specialized experience.
  - *Work Product Sample*: Assesses qualifications through a review of supporting documents like portfolios or reports.
  - *Writing Sample*: Evaluates writing competency based on previous work.
  - *Interview*: In-person or virtual evaluation through questions and responses.
    - *Job Compatibility Interview*: Gathers information on personality, interests, values relevant to the job or organization.
    - *Structured Interview*: A panel evaluates candidates' answers to a pre-defined set of questions using standard criteria, with limited discretion for interviewers.
    - *Technical Interview*: Assesses applicants' technical or specialized knowledge critical for the job.
  - *Simulation*: Exercise to assess job-related problem-solving, scored by trained SMEs.
    - *Assessment Center*: Uses various methods and exercises to evaluate competencies by simulating job-related challenges and situations.
    - *Job Simulation Exercise*: Simulates tasks like those of the job for applicants to perform.
  - *Other*: Any other assessment method not listed above.
    - Enter *Assessment Method Details* manually.
5. Indicate whether the assessment will be used for one or more of the following:
    - *Screen-out*: Pass/fail assessment determining eligibility based on results.
    - *Rating*: Scored assessment providing numerical ratings based on results.
    - *Passing Score*: Minimum score required to demonstrate proficiency for the position. Note: This option depends on the *Rating* setting being enabled.

**i** **Tip**: Passing scores should be set through a comprehensive process involving job and assessment experts (e.g., SMEs and Industrial/Organizational Psychologists). For more information, refer to the [Assessment Passing Scores FAQs](#).
  6. The *Standardize scores* option is disabled by default. You can enable it for *Rating* assessments. Refer to the [Selecting a Scoring Option for a Manual Assessment](#) section for use cases.
  7. When using the assessment for rating, enter the minimum and maximum raw scores for each rating combination. Different values can be used if there are multiple rating combinations.
    - *Min Raw Score*: Minimum points an applicant can receive.
    - *Max Raw Score*: Maximum points an applicant can receive.
  8. Click *Save*. The tab title will update with the Assessment Name, and the Competencies, Passing Score Criteria, and Checklist pages will be enabled. The *Assessment Type* field will be locked, but other fields can still be updated.
  9. On the Competencies page, you can document any competencies that will be evaluated using the Manual Assessment. You can add them from the competency network library or create them manually if permitted.
 

**i** **Tip**: Competencies added to your Manual Assessment will be shown on the USAJOBS announcement if you include the Competencies List or Competencies Bullets data insert. If assessing the same competency with different assessments, use the same *Competency ID* to avoid duplication.
  10. On the Passing Score Criteria page, you can see the raw score range for each rating combination. If Passing Score is enabled, set the score applicants need to demonstrate

minimum required proficiency. For more information, visit the Assessment Passing Scores FAQs on the [USA Staffing Resource Center](#).

11. After creating your Manual Assessment, navigate to the Assessment Package - Checklist page. The Checklist page identifies any potential issues that may require attention. If no issues are highlighted and no additional assessments are required, click *Complete Assessment Package*.

## Selecting a Scoring Option for a Manual Assessment

Scoring decisions affect applicant ratings and depend on factors like assessment type, scoring scale, sample size, and number of assessments. While this guide explains system options, we encourage you to consult an Industrial/Organizational Psychologist or assessment expert for help choosing the best scoring method for your assessment. The primary scoring decision for Manual Assessments is whether to standardize scores. Standardizing scores is generally recommended when combining multiple assessments with different rating scales to properly combine and calculate an applicant's final score.

### Manual Assessment Score Calculation

#### Non-Standardized Scores

In Manual Assessments, scores are not standardized by default. When the *Standardize Scores* setting is disabled, the system uses the following formula to convert, or transmute, raw scores into a 70 to 100 scale.

$$\text{Applicant Transmuted Score} = 70 + \frac{(\text{Applicant Raw Score} - \text{Minimum Raw Score})}{(\text{Maximum Raw Score} - \text{Minimum Raw Score}) \times 30}$$

#### Sample Use Cases for Non-Standardized Scores

- The Manual Assessment will be the only scored assessment within the Assessment Package. For instance, if an occupational Questionnaire is used only for screening applicants' minimum qualifications, pairing it with a scored Manual Assessment will not require standardizing scores.
- The Manual Assessment will be used to input applicant scores that have been standardized before being imported into USA Staffing.
- The applicant pool is small, or the assessment demonstrates limited differentiation among applicants, meaning all applicants scored roughly the same on the assessment(s).

#### Standardized Scores

Enabling the *Standardize scores* option for a Manual Assessment allows the system to compare an applicant's performance relative to other applicants for the same vacancy who completed the same assessment when calculating their transmuted score.

To calculate an applicant's transmuted score, the system first finds the average (mean) applicant raw score and the assessment's raw score standard deviation. It then converts the raw score to a z-score and converts it into a 70-100 scale using the following formulas:

$$\text{Applicant Z-Score} = (\text{Applicant Raw Score} - \text{Mean Raw Score}) / \text{Raw Score Standard Deviation}$$
$$\text{Applicant Transmuted Score} = 70 + ((\text{Applicant Z-Score} - \text{Min Z-Score}) / (\text{Max Z-Score} - \text{Min Z-Score}) \times 30)$$

If the Assessment Package includes multiple rated assessments, each assessment's transmuted scores will be calculated and combined according to the weights from the Assessment Plan to determine each applicant's final score.

If you are using a Manual Assessment in combination with a rated Assessment Questionnaire and you enable the Standardize scores setting for the Manual Assessment, applicants' Assessment Questionnaire scores will automatically be standardized prior to combining the two.

### Sample Use Cases for Standardizing Scores

- The Manual Assessment will be used for screening purposes and will be combined with a USA Hire Assessment.
- The Manual Assessment will be combined with another Manual Assessment (e.g., structured interview, writing assessment, or accomplishment record).
- The Manual Assessment will be used to input applicant scores that have not been standardized before being imported into USA Staffing.

### Standardized Scores Using Custom Values

Enabling the *Standardize scores* option for a Manual Assessment allows you to enable the *Standardize using custom values* setting, which lets you:

- Set custom *Min Z-Score* and *Max Z-Score* on the Assessment Information page.
- Set custom Mean Raw Score and Standard Deviation for each rating combination on the Assessment Plan page.

With this setting, the system uses the same standardization formulas but applies the HR user specified custom values instead of default Min and Max Z-Scores (-3 and 3 respectively).

### Sample Use Case

- The agency has frequently administered the assessment and prefers to use standardization values determined based on previous administrations of the assessment rather than system-calculated values for each vacancy announcement.

## Exporting/Importing Manual Assessment Lists

### Exporting an Applicant List

Eligible applicants who meet the Hurdle Criteria will be given a Pending Assessment (PA) Record Status Code. This means they are missing scores for required assessments and will remain in PA status until Manual Assessment scores are entered, and a final score can be calculated. There are two methods to enter applicant scores for Manual Assessments:

- Using the *Export/Import* process to generate an applicant list in an Excel comma separated value (.csv) file for importing results, or
- Key entering results individually in the *Rating Details* for each applicant.

To export a list of applicants:

1. From the Applicant Overview tab, select *Create List*.
2. Apply the necessary filter criteria and *Save* the list. For example, PA applicants will include all applicants who are ‘Pending Assessment’ results.
3. Select *Export Manual Assessment File* from the gear icon located on the top right section of the saved list.
4. Select the Manual Assessment and choose to include *All Applicants* or *Filtered Applicants* in the export file. You can also add applicants' *USAJOBS Applicant GUID*, *Email Address*, *Phone Numbers*, and/or *Augmented Scores*. After making the required selections, click *Export*.
5. Click *OK* when the message "Your export file is being generated. You will receive an alert when it is ready. Click the alert to download the file." appears.
6. Once received, click the alert message to download the .csv file.

	A	B	C	D	E	F	G	H	I	J	K	L
	Vacancy ID	Assessment ID	Assessment Name	Application ID	Application Rating ID	Applicant Last Name	Applicant First Name	Applicant Middle Name	Application Number	Rating Combination	Assessment Rating	Minimum Qualifications Rating
2	11010855	37391	SME Review	46471	49269	Blair	Adeline		A6RIG-S0FS	0201-11		
3	11010855	37391	SME Review	46471	49270	Blair	Adeline		A6RIG-S0FS	0201-12		
4	11010855	37391	SME Review	46477	49279	Rivas	Lamar		A4TLA-ALL3	0201-11		
5	11010855	37391	SME Review	46477	49280	Rivas	Lamar		A4TLA-ALL3	0201-12		
6	11010855	37391	SME Review	46476	49278	Wilson	Beth		AD465-9ZEB	0201-12		
7	11010855	37391	SME Review	46474	49274	Wetmore	Maria		A59M1-Q5F5	0201-11		
8	11010855	37391	SME Review	46474	49275	Wetmore	Maria		A59M1-Q5F5	0201-12		
9	11010855	37391	SME Review	46475	49277	Agreste	Adrian		ARCSP-KJPJ	0201-12		

The system-generated export file allows you to import applicant results into the Manual Assessment. The file contains one row per applicant/rating combination. For instance, a GS-0201-11/12 vacancy will have two rows per applicant unless an applicant selects GS-12 as their lowest acceptable grade, in which case there will be only one row.

The export file contains two columns to input assessment results for import into USA Staffing:

- *Assessment Rating*: Entries must be numeric, within the specified Min and Max Raw Score values, and can include decimal points.
- *Minimum Qualifications Rating*: Entries must be a system-defined 4-character NOR Message Code. A complete list of NOR codes is available [here](#).

You can enter numerical scores and/or NOR codes for eligible and ineligible applicants for each rating combination. For example:

- For eligible applicants, enter their numerical score in the *Assessment Rating* field and leave the Minimum Qualification Rating blank. The system will default the assessment-level NOR code to ELTE upon import.

- For ineligible applicants, enter the appropriate NOR code in the *Minimum Qualifications Rating* column (e.g., IQID) and leave the Assessment Rating blank. The ineligible NOR code will become the applicant's minimum qualification rating upon import.

Vacancy ID	Assessment ID	Assessment Name	Application ID	Application Rating ID	Applicant Last Name	Applicant First Name	Applicant Middle Name	Application Number	Rating Combination	Assessment Rating	Minimum Qualifications Rating
11010855	37391	SME Review	46471	49269	Blair	Adeline		A6RIG-S0FS	0201-11		15
11010855	37391	SME Review	46471	49270	Blair	Adeline		A6RIG-S0FS	0201-12		12
11010855	37391	SME Review	46477	49279	Rivas	Lamar		A4TLA-ALL3	0201-11		IQMA
11010855	37391	SME Review	46477	49280	Rivas	Lamar		A4TLA-ALL3	0201-12		IQMA
11010855	37391	SME Review	46476	49278	Wilson	Beth		AD465-9ZE8	0201-12		5
11010855	37391	SME Review	46474	49274	Wetmore	Maria		A59M1-Q5F5	0201-11		IQID
11010855	37391	SME Review	46474	49275	Wetmore	Maria		A59M1-Q5F5	0201-12		IQSE
11010855	37391	SME Review	46475	49277	Agreste	Adrian		ARC9P-KPJ	0201-12		24

**i Tips:**

- Avoid special characters in the file name as they can disrupt the import process.
- Keep the file type as .csv. If saved as another type, revert it back to .csv before importing.
- Do not modify the data exported in the file.
- You can add new columns if headers differ from the original ones. Do not use commas in new headers to prevent misalignment (e.g., "Panel Member 1" is fine, but "Chairman, Panel 1" will cause issues).
- You can delete rows pertaining to applicants for which you're not importing scores.

When using a passing score, USA Staffing will automatically check if the applicant's score meets the *Passing Score* specified based on the *Assessment Rating* value:

- If the score meets or exceeds the passing score, the rating is calculated from the passing score as the minimum value. If a NOR code is entered in the 'Minimum Qualifications Rating' column, it is applied to the assessment's minimum qualifications; otherwise, ELTE is used by default.
- If the applicant's score falls below the passing score, the NOR code entered is applied to the assessment's minimum qualifications; otherwise, IQMA is used by default. Note: IQMA code states: You are ineligible to proceed in the hiring process because you did not attain the overall passing score on the assessment(s) for this position.

## Importing Applicant Results

To import applicant results for the Manual Assessment:

- Open the previously created Saved List.
- Click the gear icon, then select *Import Manual Assessment Results*.
- Click *Choose File*, locate your file, and click *Import*.
- Click *OK* when the message "Your scores are being imported. When complete you will receive an alert." appears.
- Once the import is complete, you will get an alert indicating the *Import Completed Successfully* or the *Import Encountered Errors*. If there are errors, click the alert for detailed information. When *Standardize scores* is disabled in your Manual Assessment, a successful import updates

applicants' RSCs from PA to AA or IN and finalizes their ratings. However, if *Standardize scores* is enabled, follow these extra steps after a successful import:

6. Click the gear icon and select the *Calculate Manual Assessment Scores* option.
7. Click *OK* when the message “Scores are calculating offline; you will receive a notification when the calculations are complete.” appears.
8. Once the calculation is complete, you will get an alert, and applicants will have final ratings instead of PA status.

**i** **Tips:**

- Limit import files to 500 rows to prevent performance issues. For larger files, break them into smaller ones and import them separately.
- To fix an applicant’s rating error, update their Rating Details manually or correct the import file and re-import it. The system only keeps the latest data.
- Rate and input Manual Assessment scores for all applicants to ensure accurate mean and standard deviation calculation.
- For further assistance, submit a helpdesk ticket.

## Using a Manual Assessment with a Panel Review

If your agency uses a Subject Matter Expert (SME) panel to review applicant documents and evaluate candidate qualifications, you can either [print multiple applicant documents in a single PDF](#) to send to the panel outside USA Staffing or you can use the Panel Review feature.

Panel Reviews let you send a *Stored List* of applicants to one or more SME before certification. SMEs, with Hiring Manager access, can view documents and application information securely within the USA Staffing interface.

Panel Review assignments allow you to set the Hiring Manager's access level to either:

- *View Only*: Review applicant information/documents and enter notes (recommended).
- *Edit/Override Scores*: Review applicant information/documents, enter notes, and provide input on applicant qualifications and final scores. **Note:** This option is not recommended if using a Manual Assessment as part of the applicant’s final score.

To use a Manual Assessment with a Panel Review:

1. Create a Manual Assessment as part of your vacancy’s Assessment Package as outlined above.
2. [Create a Stored List](#) of applicants for the SME panel review process.
3. [Generate a Manual Assessment Export File](#) from a Saved List of applicants save/upload the panel review results.
4. Create a Panel Review.
5. Add relevant *Review Instructions*.
6. Include the Stored List created for this review. **Note:** Confirm the *Display Preferences* from the Stored List Information page to ensure only the appropriate applicant information is visible to SMEs.
7. Grant Hiring Managers *View Only* access to the list.

8. Upload the applicant export file generated from the Saved List and any applicable rating guides to the *Review Documents*.
9. The SME panel members will view each applicant's documents (e.g., resume, cover letter, accomplishment records) and use the export file to input scores, then attach the completed spreadsheet to the Panel Review and return it to HR.
10. Download the file from the Panel Review and [import it from the Saved List](#) to update each applicant's final rating using the weights designated in the Assessment Package.

## Manual Assessment Permissions

HR users can view and create Manual Assessments in USA Staffing based on the following permissions granted for Assessment Packages and Assessment Package Templates respectively:

- *View Manual Assessment*: Allows users to view content in a Manual Assessment.
- *Create/Edit Manual Assessments*: Allows users to create or edit Manual Assessments.
- *Create/Edit Assessments that standardize scores*:
- *Create/Edit Assessments that standardize w/custom values*: Allows users to standardize scores using vacancy- level mean and standard deviation values.
- *Apply Passing Score to Assessments*: Allows users to enable the *Passing Score* setting and set a minimum passing score for an assessment.

The following Manual Assessment permission settings are defaulted for *System-level* permission profiles for both Assessment Packages and Assessment Package Templates:

- *Office Administrator*: All Manual Assessment-related permissions are enabled.
- *Standard HR User and HR Assistant*:
  - *View Manual Assessment* is enabled.
  - All three *Create/Edit* permissions are disabled.
  - *Apply Passing Score to Assessments* is disabled.
- *HR View Only and Onboarding Only User*: All Manual Assessment-related permissions are disabled.

An agency's USA Staffing Office Administrator can enable or disable these settings for *Custom-level* permission profiles. Most of these permissions are unpaid to let assessment professionals, who don't usually perform core HR tasks, create Manual Assessments or verify assessments were created properly by another HR user. The *Apply Passing Scores to Assessments* permission is paid for Assessment Packages but unpaid for Assessment Package Templates.

# Scenarios

## Scenario 1: Third-Party Biodata Assessment

The agency will assess all applicants who meet minimum qualifications using a third-party biodata assessment. This assessment has a possible score range of 0 to 250, and applicants must score 45 or higher to demonstrate the minimum proficiency level required for the position.

Manual Assessment Set Up:

- *Assessment Method*: Online/Paper-Pencil Assessment
- *Assessment Method Details*: Biodata
- *Screen-out*: Enabled (assessment is pass/fail)
- *Rating*: Enabled (assessment is scored)
- *Passing Score*: Enabled (applicants must achieve a certain score to pass the assessment)
- *Min Raw Score*: 0
- *Max Raw Score*: 250
- *Passing Score Criteria*: 45 (raw score that applicants must meet to pass the assessment)

## Scenario 2: Structured Interview

The agency is hiring for a position at two grade levels and will use a structured interview to determine the best qualified candidates. The interview has 5 questions for the lower grade and 6 for the higher grade, each rated on a 1 to 5 scale based on critical competencies. While applicants can't fail the interview, not participating or missing the interview appointment will make them ineligible for further consideration.

Manual Assessment Set Up:

- *Assessment Method*: Interview
- *Assessment Method Details*: Structured Interview
- *Screen-out*: Enabled (applicants will be ineligible if they fail to complete the interview)
- *Rating*: Enabled (interview is scored)
- *Passing Score*: Disabled (interview is not pass/fail)
- *Min Raw Score*: reflects the minimum of 1 point per question
  - Lower grade: 5
  - Higher grade: 6
- *Max Raw Score*: reflects the maximum of 5 points per question x number of questions
  - Lower grade: 25
  - Higher grade: 30
- *Competencies*: Add competencies to be evaluated during the interview